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Foreign Crops and MARKETS

VOLUME 55 NUMBER 25

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FOR RELEASE

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UNITED STATES DEPARTMENT OF AGRICULTURE, WASHINGTON, D.C.

LATE NEWS

Seven tons of Spanish tangerines, the first air shipments of 1947-48 tangerines, were sent to England on November 6, on private account, according to a Madrid press item. A total of 40 tons is to be flown. The price was not reported but will not exceed the British ceiling price of 40 pounds sterling per ton, (approximately $4.80 per box of 60 pounds).

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Apple holdings in Canada on December 1, 1947 were 4,126,000 bushels in cold storage and 2,373,000 bushels in common storage, according to the Dominion Department of Agriculture. These holdings compare with 3,903,000 bushels in cold storage and 3,457,000 bushels in common storage on December 1, 1946 and 5-year average (1942-46) holdings of 3,044,000 bushels in cold storage and 3,010,000 bushels in common storage.

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Total holdings of pears in both cold and common storage in Canada were reported to be 54,378 bushels as of December 1, 1947, as compared with 51,468 bushels on the same date in 1946, and an average of 32,030 bushels for the five years, 1942-46.

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Exports of apples from Canada for the period July 1 through December 6, 1947, totalled 1,714,000 bushels, according to the Dominion Department of Agriculture. Although the report does not provide a breakdown by country of destination, exports to the United States through that period totalled nearly 1,200,000 bushels, leaving about 500,000 bushels as the total of exports to other countries.

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A supplemental trade agreement protocol between Finland and Denmark, effective pending conclusion of a new agreement for 1948, has been reportedly signed in Helsinki. It provides for the exchange of Finnish lumber, woodpulp, newsprint, cardboard, greaseproof and bag paper, for Danish butter, beef, pork, sugar and apples.

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A trade and payments agreement between the Soviet Union and Czechoslovakia, was concluded December 13, 1947, according to a press announcement in Moscow. The agreement is said to cover the 5-year period 1948-52, in which the Soviet Union will supply cotton grains, petroleum, ore, pig iron and raw steel in exchange for cloth, sugar and a considerable number of industrial products. No indication is given of the quantities of the individual products or of their valuations in exchange but total annual deliveries from each country are reported to have been fixed at 5 billion Czech crowns ($102 million).

SOYBEAN PRODUCTION SMALLEST IN SEVERAL YEARS

World soybean production for 1947 is estimated at 490 million bushels, 4 percent less than a year ago, and the smallest outturn since 1940. The decrease from last year is chiefly the result of lower yields per acre in the United States and Canada. While official figures are not available for Manchuria, indications are that the crop is smaller than the 122.6 million bushels harvested in 1946. Increases, however, are reported for China, Korea, and the Netherlands Indies. According to recent information European soybean production is the largest in three years.

Canada's 1947 soybean harvest of .8 million bushels is the smallest since 1943. An early forecast indicated that 72,000 acres were being planted to this crop, but unfavorable weather during the growing season resulted in a much smaller harvested acreage. The present estimate is 49,000 acres, 17 percent below that of last year but the second largest for that country. The ceiling price for Nos. 1 and 2 Canada grade soybeans from the 1946 crop was increased from $2.15 to $2.40 per bushel, f.o.b. Toronto, and remained in effect until ceilings were removed on October 21, 1947. After that date soybean prices increased and by early November had reached $3.25 per bushel.

The tentative goal for 1948 soybeans is 100,000 acres. Based on a 5-year (1943-47) average yield per acres, production should approach 2 million bushels. A crop even this size would be insufficient to meet domestic requirements. Limited production has necessitated the importation of both soybeans and soybean oil of which the United States has been the source of supply. During the crop year ended July 31, 1947, imports of soybeans totaled 1.8 million bushels and oil 10.8 million pounds (equivalent to 1.2 million bushels of beans). At present, however, soybeans are on Canada's restricted import list.

United States soybean production of 177.4 million bushels is down approximately 10 percent from the record of 196.7 million bushels in 1946, despite a larger acreage. Indicated yield per acre is 16.6 bushels compared with 20.5 last year and the 1935-39 average of 20.7 bushels.

Exports of soybeans and oil (in terms of beans) amounted to 12.9 million bushels in 1946, and 8.6 million bushels during January-September 1947. In both periods, exports, chiefly in the form of oil, were permitted in exchange for allocations of other types of oil needed in the United States.

The goal for 1948 soybeans is 10.8 million acres, somewhat larger than the area indicated for harvest in 1947. In view of the favorable prices received in the current year it is expected that farmers will plant the desired acreage. The average United States price to farmers in November 1947 was $3.43 per bushel.

While complete official estimates for European soybean production are not available, indications are that most of the countries increased their 1947 acreages.

China's 1947 soybean crop is estimated at 173.4 million bushels, 6 percent greater than that of last year and the largest since prewar years (1935-39). The yield per acre, higher than in former years, is a result of favorable weather.

(Text continued on Page 425; Table follows)

SOYBEANS: Acreage, yield per acre, and production in specified countries, year of harvest, average 1935-39, annual 1944-47

Country	Acreage					Yield per acre					Production				
	Average 1935-39	1944	1945	1946	1947 a/	Average 1935-39	1944	1945	1946	1947	Average 1935-39	1944	1945	1946	1947 a/
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	Bushels	Bushels	Bushels	Bushels	Bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
North America															
Canada	b/ 10	36	46	59	49	20.7	18.8	18.3	18.1	16.4	b/ 207	682	844	1,072	806
United States c/	3,042	10,232	10,661	9,606	10,698	18.5	18.8	18.0	20.5	16.6	56,167	191,958	192,076	196,725	177,379
Europe															
Bulgaria	34	15	17	44	-	12.1	9.9	3.3	7.0	-	416	153	55	305	-
Hungary	d/ 7	62	6	5	8	16.9	14.7	8.6	10.4	11.4	d/ 125	908	48	56	90
Italy	-	-	2	2	8	-	-	15.4	15.8	27.4	b/ 1	22	32	27	210
Rumania	27	-	-	-	-	12.3	-	-	-	-	332	-	-	-	-
U.S.S.R. (Europe and Asia)	d/ 607	-	-	-	-	-	-	-	-	-	d/ 5,805	-	-	-	-
Asia															
Turkey	d/ 1	1	2	-	4	29.0	-	-	-	-	d/ 37	18	18	16	56
China proper (22 provinces) e/	b/ 12,411	10,018	9,967	9,944	9,981	16.7	15.0	16.4	16.5	17.5	b/ 207,666	149,956	163,287	163,612	174,257
Manchuria	8,992	8,546	8,167	7,187	-	16.8	15.3	15.6	17.1	-	151,294	130,425	127,749	122,639	-
Japan proper	b/ 812	724	684	-	-	15.4	13.9	9.6	-	-	12,499	10,050	6,540	13,228	-
Formosa	b/ 17	-	-	-	-	8.9	-	-	-	-	b/ 151	-	-	-	-
Korea f/	b/ 1,921	1,502	661	619	818	10.0	8.5	7.6	7.8	13.3	17,654	12,787	5,007	4,818	10,861
Netherland Indies g/	889	458	321	583	700	10.9	8.7	7.0	7.6	9.6	9,731	3,968	2,247	4,406	6,719
Total World h/	29,100	32,400	31,400	29,800	31,000	-	-	-	-	-	464,200	506,500	503,800	512,800	490,000

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States foreign service officers, results of office research, or other information. Prewar estimates for countries having changed boundaries have been adjusted to conform to present boundaries, except as noted.

a/ Preliminary. b/ Average of less than 5 years. c/ Acreage harvested for beans. d/ One year only. e/ Partly estimated. f/ Beginning with 1945 figures represent South Korea only. g/ Java and Madura. h/ Includes estimates for the above countries for which data are not available and for minor producing countries.

An estimate of the quantity of soybeans produced in Manchuria during the current season is not yet available. Production, however, is believed to be less than the 122.6 million bushels estimated for 1946 and considerably below the prewar average. Although crops have been smaller than average in the past few years, sizeable stocks of soybeans are reported to have accumulated. Normally about 78 percent of the output was exported in various forms, while out of the 1945 and 1946 crops only a small percentage left the country. Approximately a million bushels are reported to have been shipped to Western Europe this year, and there is a steady movement by rail to the Soviet Union.

Soybean production in other countries of Asia is comparatively small. South Korea's 1947 output is approximately 11 million bushels, more than double last year's crop but 62 percent of the prewar average (total Korea). The Netherlands Indies reports 6.7 million bushels compared with 4.4 million last year and 2.2 million in 1945.

South American countries have shown a great deal of interest in growing soybean but so far production has been small. Argentina, Brazil, Chile, Ecuador and Paraguay have reported, intermittently, estimates ranging from 2,000 to 100,000 bushels.

The Union of South Africa's Agricultural Department has conducted extensive research on the possibilities of soybean cultivation in that country. If production has passed the experimental stage, estimates are not included in official publications.

Australia appears eager to develop soybean production. The government is experimenting with numerous varieties of seed and planted 2,200 acres in 1946, but so far there is no indication of the yield. Queensland seems best suited to the production of this crop.

This is one of a series of regularly scheduled reports on world agricultural production approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report the Committee was composed of C. M. Purves, Acting Chairman, Fred J. Rossiter, Regina H. Boyle, and Helen Francis.

WORLD CORN PRODUCTION BELOW 1946 CROP

World corn production for 1947-48 is still expected to be about 4.7 billion bushels, according to information available to the Office of Foreign Agricultural Relations. An outturn of that size, though almost as large as the 1935-39 average, is about 600 million bushels, or 12 percent smaller than the record 1946 crop.

The reduction in the United States crop accounts for the bulk of the decline. Substantial increases in Continental Europe, especially in the Danube Basin countries, and in the Soviet Union were not great enough to balance the reduction of about 27 percent in the United States and moderate reductions in estimates for Asia, South America, and Africa.

Corn planting is nearing completion in most important areas of the Southern Hemisphere. No estimates of the acreage planted are yet available, and allowances made for that area are still only tentative forecasts. The acre-

(Continued on Page 428; table follows)

CORN: Acreage, yield per acre, and production in specified countries,
Year of harvest, average 1935-39, annual 1945-47 a/

Continent and country	Acreage b/				Yield per acre c/				Production			
	Average 1935-39	1945	1946	1947 d/	Average 1935-39	1945	1946	1947 d/	Average 1935-39	1945	1946	1947 d/
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	Bushels	Bushels	Bushels	Bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
North America:												
Canada	172	237	252	176	40.8	43.7	42.3	38.0	7,010	10,365	10,661	6,682
Guatemala	1,000		1,200	-	15.7	14.9	-	-	15,700	17,900	-	-
Honduras	e/ 258	-	-	-	e/ 14.0	-	-	-	3,717	-	-	-
Mexico	7,501	8,527	8,187	8,154	9.0	10.1	11.5	10.6	67,523	86,066	93,799	86,609
Nicaragua	e/ 86	199	150	150	e/ 17.4	17.8	13.0	16.7	1,500	3,544	1,955	2,500
United States	92,699	88,079	88,718	84,331	25.0	32.7	37.1	29.0	2,315,554	2,880,933	3,287,927	2,447,422
Cuba	360	360	400	400	16.7	14.5	15.6	16.3	6,000	5,214	6,250	6,500
Estimated total f/	103,130	100,210	100,540	96,060	-	-	-	-	2,430,000	3,026,000	3,440,000	2,590,000
Europe:												
Albania	235	205	250	250	21.6	16.6	20.0	22.0	5,067	3,400	5,000	5,500
Austria	163	-	-	-	41.3	-	-	-	6,732	-	-	-
Bulgaria	g/ 1,733	1,798	-	-	g/ 18.0	5.1	-	-	g/ 31,173	9,183	17,606	35,000
Czechoslovakia	e/ 395	350	340	285	e/ 28.6	-	20.6	21.1	e/ 11,300	-	7,000	6,000
France	839	529	603	675	26.9	11.9	16.6	13.3	22,559	6,300	10,000	9,000
Germany	85	-	-	-	47.1	-	-	-	4,000	-	-	-
Greece	650	509	653	618	15.5	12.4	12.1	16.2	10,078	6,300	7,900	10,000
Hungary	2,925	3,016	2,900	3,000	31.5	24.4	18.5	24.3	92,007	73,657	53,680	73,000
Italy	3,595	3,350	3,200	3,200	31.5	20.9	27.1	28.9	113,174	70,000	86,600	92,500
Portugal	997	1,089	1,320	1,310	13.1	11.2	12.7	12.0	13,083	12,204	16,700	15,700
Rumania	9,870	-	-	-	17.4	-	-	-	172,000	-	-	-
Spain	h/ 1,086	872	915	990	h/ 26.7	21.3	22.7	20.2	h/ 28,955	18,562	20,802	20,000
Yugoslavia	6,615	-	-	-	26.7	-	-	-	176,600	-	-	-
Estimated total f/	29,200	26,140	26,430	30,070	-	-	-	-	687,000	460,000	400,000	680,000
U.S.S.R. (Europe and Asia)	10,000	-	6,500	7,200	17.0	-	12.3	17.4	170,000	-	80,000	125,000
Asia:												
Turkey	1,098	1,428	1,260	1,397	20.9	8.1	18.6	15.5	22,971	11,603	23,419	21,632
Burma	217	-	-	-	7.6	-	-	-	1,640	-	-	-
China	e/ 12,000	14,200	14,200	13,800	e/ 21.8	22.2	21.5	20.7	e/ 262,000	315,000	305,000	286,000
Manchuria	3,720	7,705	-	-	23.3	21.1	-	-	86,586	162,295	-	-
French Indochina	1,019	-	-	-	20.8	-	-	-	21,168	-	-	-
India	8,265	9,500	9,400	9,000	13.1	12.1	11.7	11.7	108,000	115,000	110,000	105,000
Japan	e/ 128	-	-	-	e/ 23.6	-	-	-	e/ 3,017	4,134	3,268	3,600
Korea	e/ 321	-	-	-	e/ 13.0	-	-	-	e/ 4,177	-	-	-
Java and Madura	5,150	-	-	-	15.5	-	-	-	79,976	-	-	-
Philippine Islands	1,718	-	1,291	1,483	9.4	-	9.2	11.7	16,129	-	11,823	17,322
Estimated total f/	33,830	40,860	38,150	37,630	-	-	-	-	608,000	717,000	650,000	635,000

South America:																
Argentina		10,775	6,461	6,431	-		28.0	21.8	35.6	-		301,986	140,701	228,924	-
Brazil		10,025	10,683	-	-		21.5	21.0	-	-		215,153	224,538	200,000	-
Chile		110	115	116	-		22.7	22.2	23.2	-		2,496	2,549	2,690	-
Colombia	i/	1,374	-	1,651	-	i/	14.1	-	14.8	-	e/	15,276	29,504	24,408	-
Uruguay		531	378	452	-		9.8	8.5	11.9	-		5,188	3,226	5,393	-
Estimated total f/		24,720	21,180	20,190	21,070		-	-	-	-		568,000	432,000	493,000	470,000
Africa:																
Belgian Congo	e/	179	-	-	-	e/	27.9	-	-	-		5,000	-	-	-
Kenya j/	e/	108	125	-	-	e/	31.0	26.7	-	-	e/	3,350	3,340	3,200	-
Basutoland		350	-	-	-		8.1	-	-	-		2,822	-	-	-
Egypt		1,599	1,950	1,716	1,600		39.5	34.3	32.6	34.4		63,229	66,821	55,980	55,000
French Morocco		1,112	1,280	1,290	1,260		7.6	1.3	6.1	6.7		8,505	1,700	7,900	8,500
French West Africa	e/	1,732	-	-	-	e/	12.4	-	-	-	e/	21,473	-	-	-
Madagascar		260	235	222	-		15.3	10.4	10.0	-		3,969	2,441	2,213	-
Angola	e/	1,427	-	-	-	e/	9.2	-	-	-	e/	13,084	-	-	-
Southern Rhodesia j/		268	-	-	-		22.1	-	-	-		5,923	-	-	-
Union of South Africa		6,909	6,267	7,598	-		11.6	10.3	11.5	-		80,132	64,754	87,279	-
Estimated total f/		18,400	18,250	19,450	18,670		-	-	-	-		259,000	237,000	255,000	245,000
Oceania:																
Australia		314	236	275	-		22.4	24.3	21.8	-		7,030	5,741	6,000	-
New Zealand		7	7	6	-		45.4	50.0	45.8	-		318	350	275	-
Total		321	243	281	240		-	-	-	-		7,348	6,091	6,275	5,500
Estimated world total f/		219,600	213,100	210,500	210,900		-	-	-	-		4,730,000	4,965,000	5,325,000	4,750,000

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States foreign service officers, results of office research, or other information. Prewar estimates for countries having changed boundaries have been adjusted to conform to present boundaries, except as noted.

a/ Years shown refer to years of harvest in the Northern Hemisphere. Harvests of Northern Hemisphere countries are combined with those of the Southern Hemisphere which follow; thus, the crop harvested in the Northern Hemisphere in 1947 is combined with estimates for the Southern Hemisphere harvests which will begin early in 1948.

b/ Figures refer to harvested area as far as possible.

c/ Yield per acre calculated from acreage and production data shown, except for incomplete periods.

d/ Preliminary estimates in Northern Hemisphere countries, for the Southern Hemisphere where corn planting is not completed until the end of the year, tentative forecast only.

e/ Average of less than 5 years.

f/ Estimated totals, which in the case of production are rounded to the nearest million, include allowances for any missing data for countries shown and for other producing countries not shown.

g/ Estimate not adjusted to take account of inclusion of Southern Dobrudja and is, therefore, not strictly comparable with estimates shown for later years.

h/ Figure for 1935 only.

i/ Figure for 1937 only.

j/ European cultivation only.

age planted is not expected to differ significantly from that planted in 1946, which was about 15 percent below average. The size of the corn harvest, which starts in March and continues into June in the principal producing countries, will largely depend, of course, on weather conditions and the extent of insect damage during the growing season.

The crop in North and Central America, now estimated at 2,545 million bushels is about 5 percent above average but is only 74 percent of the record outturn in 1946. Total production in this area is determined mainly by the harvest in the United States, this country now accounting for about 94 percent of the continental total. In contrast with the record crop in 1946, this year's production was the smallest reported for the United States since 1936. The December estimate, which was released after the accompanying table was processed, places the current production at 2,401 million bushels, a reduction of 46 million bushels from the previous estimate. The 1946 production was also revised to 3,250 million bushels, a reduction of 38 million bushels. Acreage was much smaller than prewar, but higher yields for hybrid varieties of corn brought the total corn production above the prewar average. The estimated average yield of 28.6 bushels per acre is 8.1 bushels, or 22 percent less than the high yields a year ago. In Mexico, the second largest corn producer in this area, the crop is forecast at 87 million bushels compared with 94 million a year ago.

The corn crop in continental Europe is estimated to be about at the prewar average of 680 million bushels, which brings it well above last year's poor harvest of 400 million bushels. The relatively favorable outturn this year is attributed to increased acreage, with yields below average. Larger plantings were made to counteract, in part, the loss of small grains through winter kill. Best conditions were reported in the Balkan countries, with really substantial increases reported for the four ranking producers. The largest quantitative gains were reported for Rumania and Yugoslavia, where yields last year were sharply cut by severe drought. Conditions for the corn crop this year were reported to be unusually favorable in both countries and above-average yields were reported. In Bulgaria the harvest is placed about 100 percent above the small 1946 production and Hungary's crop is also cinsiderably larger than that of a year ago. Production in Italy, the ranking corn producer in western Europe, was larger than in 1946, but about 20 percent less than the prewar average. Outturns in other western European countries and in central Europe were generally less favorable than in 1946.

Within present boundaries of the Soviet Union, indications point to a corn acreage a little larger than in 1946 but well below average. Production appears to be well above the 1946 estimate though still somewhat smaller than in 1935-39. Yields, were also considerably above 1946 yields and about at the average level.

In Asia both acreage and production were well above average, but slightly smaller than in 1946. China's crop of 286 million bushels, representing 45 percent of the continental total, was smaller than in 1946. The reduction was due to a smaller acreage and some decline in yields. Compared with average, the acreage was larger but yields smaller. The outturn of 105 million bushels in India was smaller than in either the prewar period or 1946. Yields are estimated to be the same as the below-average yields of a year ago. Turkey's crop was slightly smaller than last year's production as a result

(Continued on page 440)

COMMODITY DEVELOPMENTS

GRAINS, GRAIN PRODUCTS AND FEEDS

U.S. RICE EXPORTS GAIN SHARPLY

Larger deliveries than usual to Cuba caused a marked increase in United States rice exports during October. Total exports amounted to 119 million pounds compared with 30 million in October 1946. Of the total, 92 percent went to Cuba. About 11 million pounds of rough rice was delivered to Canada.

RICE: United States exports to specified countries,
October 1947, with comparisons a/

Continent and country	August-July		August-October		October	
	1937-38 to 1941-42	1946-47 b/	1946	1947 b/	1946	1947 b
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Europe	43	c/	c/	c/	c/	c/
Cuba	275	465	19	178	3	109
Canada	19	24	6	14	6	8
Philippine Islands	c/	254	4	c/	0	c/
China	d/	67	c/	0	c/	0
Other countries	21	18	1	2	c/	2
Total	358	828	30	194	9	119

Compiled from official records, Bureau of the Census.
a/ Including milled rice, brown, broken, screenings and rough rice converted to milled at 65 percent. b/ Preliminary. c/ Less than 500,000 pounds.
d/ If any, included in other countries.

BRAZILIAN RICE ACREAGE DECLINES

Brazil's 1947-48 rice acreage is approximately 5 percent less than that of last year, and present prospects indicate the crop may be 6 percent smaller than in 1946-47. In Rio Grande do Sul, the principal exporting State, the acreage is 15 percent below 523,000 acres a year ago, and 34 percent less than the record of 552,000 acres in 1945-46. Planting is about completed in this State, and conditions are reported unfavorable.

The area of Sao Paulo is about 5 percent less than the acreage of last year. Lack of rainfall in the central part of Brazil is affecting the 1947-48 crop.

CHINA'S RICE CROP REVISED UPWARD

The 1947 rice harvest of China is forecast at 2,514 million bushels compared with 2,270 million in the preceding year, according to the official revised first estimate. This forecast is 160 million bushels more than the previous estimate of 1947 production, and is 96 percent of the prewar (1935-39) average, when a series of good crops was harvested.

(Continued on Page 437)

TOBACCO

SPAIN'S TOBACCO SUPPLY STILL BELOW DEMAND

In 1946, Spain imported a total of 32.1 million pounds of leaf tobacco, of which 20.1 million pounds were from Brazil, and 6.1 million from Cuba. The United States supplied 1.4 million pounds last year -- chiefly flue-cured and Burley. Most of the remainder of 1946 tobacco imports originated in the Philippines and the Dominican Republic.

No figures regarding 1947 imports are available for publication. Unofficial reports indicate that imports were low during the last half of this year. The outlook for obtaining additional supplies of imported leaf in 1948 is complicated by the lack of exchange for foreign purchases.

Imports of cigarettes in 1946 amounted to 2.9 million pounds, and cigars 419,000 pounds. The United States supplied nearly one-half of the cigarettes, and Cuba was the principal source of imported cigars. Spanish consumers prefer products manufactured from foreign leaf to those made of domestic tobacco.

In prewar years, Spanish tobacco manufacturers depended on imports for about 75 percent of their leaf tobacco supplies. Imports averaged about 50 million pounds annually during the period 1934-36, with the Philippines the ranking source of supply. Other important suppliers were the Netherlands Indies, Cuba and the United States. Since the end of the war, Brazil has assumed top position -- presumably because the Philippine tobacco industry has been slow in recovering from war devastation, and export supplies available in the Islands have been light.

In recent years, production of leaf tobacco in Spain has been encouraged by the Monoply in order to lessen the dependence on foreign countries and conserve exchange. The 1947 crop totaled about 30 million pounds, or nearly double the average prewar outturn. Rationing of tobacco products is still in effect, however, and trade sources believe an annual leaf import of at least 45 million pounds, in addition to the domestic crop, would be required to meet consumer demand in full.

CHILE'S 1946-47 TOBACCO CROP SHOWS GAIN

Chile's 1946-47 tobacco crop totaled 11.7 million pounds, from 5,876 acres, according to a report from the American Embassy at Santiago. Plantings for the 1947-48 crop are placed at 6,175 acres. The 1946-47 outturn was about 20 percent larger than the 1945-46 harvest of 9.8 million pounds, but considerably less than average production of 13.3 million during the 5 seasons 1940-41 through 1944-45.

Most of the tobacco produced in Chile consists of Paraguay and Havana types. For 1946-47, the outturn of Paraguay leaf amounted to 8.6 million pounds, and Havana 2.9 million. Only 170,000 pounds of Virginia-type flue-cured, and 33,000 pounds of Burley were harvested last season. Farm prices for 1946-47 Paraguay and Havana leaf averaged 7.3 cents per pound. Contract prices for the 1947-48 crop have been set at 10.2 cents.

In 1946, the output of tobacco products in Chile was considerably larger than in the previous year. Most of the rise was accounted for by increased manufacture of cigarettes. About 461 million packages of cigarettes (usually 10 pieces per package) were manufactured in 1946, compared with only 412 million packages in 1945. Cigars totaled 4.5 million, against 4.2 million in 1945. Output of smoking tobacco reached 4.9 million packages compared with 4 million in 1945.

Most of Chile's tobacco manufactures are made from domestic leaf. Imports of leaf tobacco during 1946 amounted to 1,432,000 pounds, of which 1,362,000 pounds were from Cuba. The United States supplied the remainder. Imports of tobacco products were insignificant.

FATS AND OILS

NETHERLANDS INDIES COPRA EXPORTS BELOW EXPECTATIONS

January-November 1947 copra exports from the Netherlands Indies amounted to 137,473 long tons, representing slightly more than one-fourth of the average annual shipments in 1935-39. Rehabilitation of the copra industry in this area has not made the progress anticipated earlier in the season. Insufficient imports of food and textiles and shortage of shipping facilities are reported to be responsible for the small quantity of copra being produced and exported. November production was estimated at 18,000 tons and stocks at the end of month were 26,000 tons.

NETHERLANDS INDIES: Copra exports, January-November 1947

Month	Netherlands	United States	Czechoslovakia	Norway	Sweden	Switzerland	South Africa	Denmark	Total
	Long tons	Long tons	Long tons	Long tons	Long tons	Long tons	Long tons	Long tons	Long tons
January	3,346	-	-	-	-	-	-	-	3,346
February	9,706	-	-	-	-	-	-	-	9,706
March	26,573	-	-	-	-	-	-	-	26,573
April	24,605	-	-	-	-	-	-	-	24,605
May	7,000	-	-	-	-	-	-	-	7,000
June	13,801	1,500	-	-	-	-	-	-	15,301
July	11,318	-	-	-	-	-	-	-	11,318
August	6,397	-	4,921	-	-	492	1,968	-	13,778
September	2,953	-	689	-	-	-	3,248	7,874	14,764
October	2,416	-	-	1,998	3,199	-	-	-	7,613
November	-	-	-	3,469	-	-	-	-	3,469
Total - (11 mos.)	108,115	1,500	5,610	5,467	3,199	492	5,216	7,874	137,473

Compiled from official sources.

PHILIPPINE COPRA EXPORTS REACH ALL-TIME HIGH

Philippine copra and coconut oil (in terms of copra) exports during January-November 1947, totaled 921,848 long tons. Of this quantity 17,265 tons were coconut oil distributed as follows: The United States 11,697 tons, Cuba 190, Italy 4,378, and the Netherlands 1,000. Approximately 31,000 of the 533,150-ton copra exports destined for the United States were allocated to other countries who requested that the copra be processed here in order that the coconut oil might be shipped directly to them.

In prewar years (1935-39) annual shipments of copra and coconut oil averaged 299,838 and 161,747 tons, respectively. In those years the United States received 69 percent of the copra and 96 percent of the oil.

PHILIPPINE ISLANDS: Copra exports, January-November 1947

Country	Jan.-Sept.	October	November	Jan.-Nov.
	Long tons	Long tons	Long tons	Long tons
United States	377,990	76,303	78,857	533,150
Canada	16,607	-	-	16,607
Mexico	1,500	-	-	1,500
Panama C. Z.	609	200	-	809
Colombia	5,300	-	-	5,300
Venezuela	7,862	-	-	7,862
Austria	12,500	-	-	12,500
Belgium	3,381	4,200	-	7,581
Czechoslovakia	7,676	-	-	7,676
Denmark	35,661	-	1,000	36,661
France	69,432	-	2,700	72,132
Bi-Zonal Germany	9,500	-	-	9,500
Italy	23,771	3,955	850	28,576
Netherlands	4,400	-	800	5,200
Norway	13,117	2,602	-	15,719
Poland	19,412	700	5,100	25,212
Sweden	9,866	-	2,032	11,898
Switzerland	12,379	-	-	12,379
United Kingdom	21,250	-	-	21,250
Yugoslavia	7,733	-	-	7,733
Undeclared European countries	799	-	-	799
India	9,200	4,000	-	13,200
Japan	6,500	-	-	6,500
Palestine	10,510	-	-	10,510
Egypt	-	-	3,560	3,560
Fr. Morocco	6,050	-	-	6,050
Un. of So. Africa	6,082	8,497	-	14,579
Total a/	699,087	100,457	94,899	894,443

Compiled from official sources.

a/ August, September and October figures have been revised.

TROPICAL PRODUCTS

BAHIA'S CACAO CROP FAR BELOW AVERAGE

Although the 1947-48 cacao crop in the State of Bahia, Brazil, has been estimated as low as 132 million pounds, it now appears it will total about 198 million pounds, according to latest reports from the American Consulate at Bahia. This is far short of the 1946-47 harvest of 312 million pounds, however, and the average of 245 million pounds for 1941-45. The reduction in this season's outturn is attributed to severe drought in some producing areas and to less than average rainfall in most of the others.

Licensing of cacao beans for export which was suspended without notice on November 24 was resumed December 1.

DOMINICAN REPUBLIC'S COFFEE CROP REVISED DOWNWARD

The Dominican 1947-48 coffee crop, previously forecast at 283,000 bags, is now placed at about 240,000 bags, according to the Dominican Commission for the Defense of Coffee and Cacao. The lack of rainfall since early October in the Cibao producing areas is responsible for the anticipated smaller outturn.

The 1946-47 crop now is officially estimated at 343,230 bags. Exports of green coffee during the 1946-47 crop year (October 1 - September 30) amounted to 176,576 bags.

SUGAR

CUBAN 1948 SUGAR PRODUCTION MAY EQUAL 1947 RECORD

Production of Cuban raw sugar in 1948 may be as large as the record high production of 6.4 million short tons in 1947, according to a recent survey made by the American Embassy at Habana.

There are indications that Cuba's total field production of sugar cane in 1947-48 may be 7 percent larger than in the 1946-47 season but the actual output of sugar is still dependent on weather conditions during the harvest season which is expected to begin in early January. Unusually heavy rains could retard harvest or an early beginning of the summer rains could shorten the grinding season. With a cane crop of the magnitude in prospect, ideal conditions relating to weather, labor, and facilities are required to provide for a full harvest.

Excellent growing weather during the growing season together with a relatively large acreage has contributed to the excellent prospects. Rainfall in the first 11 months of 1947 totaled 61.7 inches or about 18 percent above normal and 22 percent above the previous year.

COTTON

COTTON-PRICE QUOTATIONS ON FOREIGN MARKETS

The following table shows certain cotton-price quotations on foreign markets, converted at current rates of exchange:

COTTON: Spot prices of certain foreign growths and qualities in specific markets

Market location, kind, and quality	Date 1947	Unit of weight	Unit of currency	Price in foreign currency	Equivalent U.S. cents per pound
Alexandria		Kantar			
Ashmouni, Good	12-11	99.05 lbs.	Tallari	44.50	37.13
Ashmouni, F.G.F.	"	"	"	42.00	35.04
Giza 7, Good	"	"	"	49.00	40.88
Giza 7, F.G.F.	"	"	"	(not	quoted)
Karnak, Good	"	"	"	53.75	44.85
Karnak, F.G.F.	"	"	"	51.00	42.55
Bombay		Candy			
Jarila, Fine	"	784 lbs.	Rupee	460.00	17.70
Broach, Fine		"	"		
Sind American, Fine	"	"	"	585.00	22.52
Punjab " 289-F, Fine	"	"	"	675.00	25.98
Kampala, East African	"	"	"	920.00	35.41
Buenos Aires		Metric ton			
Type B	12-12	2204.6 lbs.	Peso	2,590.00	34.98
Lima		Sp. quintal			
Tanguis, Type 5	12-11	101.4 lbs.	Sol	167.00	25.33
Pima, Type 1	"	"	"	198.00	30.04
Recife		Arroba			
Mata, Type 5	12-12	33.07 lbs.	Cruzeiro	130.00	21.39
Sertao, Type 5	"	"	"	135.00	22.21
Sao Paulo					
Sao Paulo, Type 5	"	"	"	179.50	29.53
Torreon		Sp. quintal			
Middling, 15/16"	"	101.4 lbs.	Peso	142.00	28.81

Compiled from weekly cables from representatives abroad.

FRUITS, VEGETABLES AND NUTS

BRITISH COLUMBIA SHIPS 1,466 CARS OF APPLES TO U. S. MARKETS

Shipments of British Columbia packed apples to United States markets for the 1947-48 season through December 11 totaled 1,498 cars (1,194,400 boxes), compared with 532 cars through the comparable date last season and 1,310 cars by early December from the 1944 crop.

During the 1946-47 season, British Columbia exported a total of 2,552,000 bushels of apples to the United Kingdom and such exports totalled 529,000 bushels in the 1944-45 season. Total exports of fresh apples from Canada to the United Kingdom in 1946-47 were 4,492,000 bushels and in 1944-45, 1,034,000 bushels. The United Kingdom did not purchase Canadian apples from the 1947 crop.

Of the 1,498 cars shipped to the United States this season, 400 were destined for Illinois, 186 for Wisconsin, 124 for Minnesota, 110 for Texas, 94 for Michigan, 80 for Missouri, 62 for Iowa, 42 for Massachusetts, 39 for New York, 31 for Pennsylvania, 28 for Alabama, 27 for Indiana, 25 for Florida, 25 for Nebraska, 22 each for Ohio and Tennessee, 20 for Oklahoma, 19 for Kansas, 19 for Georgia, 16 for Mississippi, 14 each for South Carolina and North Dakota, 13 for Louisiana, and 12 each for California and Kentucky. The shipments have been billed to a total of 35 States.

LIVESTOCK AND ANIMAL PRODUCTS

FRENCH MILK SUPPLY SHARPLY REDUCED

As a result of unfavorable weather conditions after mid-July, French milk production in the July-September quarter fell about 4 percent below the output for the same quarter in 1946. The drop in output is in sharp contrast to higher production in the first half of 1947 when 14 percent more milk was produced in France than for the same period in 1946.

The effects of the shortage of pasture and feed supplies caused by the summer drought have continued into the October-December period and output for this quarter is expected to be almost 15 to 20 percent below the 1946 production for the fourth quarter.

The reduced milk production together with gasoline shortage for transportation have imperiled the supply of fluid milk to the cities, making necessary the use of stocks of powdered and canned milk to fill in part the current rations. During the latter half of November, arrivals averaged only 483,000 liters a day. As the arrival of about 930,000 liters is necessary to fill all rationing needs, many ration groups are receiving little or no fresh milk. Current supplies are adequate only for children under four years of age, and powdered and condensed milk is now being used to fill the rations of pregnant and nursing women and medical diets.

The accompanying table indicates the output of milk and milk products during the July-September period. Similar information for the January-June period appeared in the August 18 issued of *Foreign Crops and Markets*.

FRANCE: Production of Milk and Dairy Products
July, August, September, 1947

Item	July	Aug.	Sept.	Third Quarter 1947 total	Third Quarter 1946 total
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Milk					
Total production 1/	2,567	1,817	1,636	6,020	6,234
Commercially utilized	1,288	974	879	3,141	3,257
As fluid milk	505	347	362	1,214	1,108
In manufactured products	783	627	517	1,927	2,149

continued

continued FRANCE: Production of Milk and Dairy Products, July, August, September, 1947.

Item	July	Aug.	Sept.	Third Quarter 1947 total	Third Quarter 1946 total
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Products					
Butter	475	375	313	1,163	1,405
Cheese	291	238	194	723	708
Condensed milk	14	11	7	32	30
Dried milk	2	2	2	6	4
Casein	1	1	1	3	2

1/ Estimated.

Office of Foreign Agricultural Relations. Data from official French sources.

URUGUAYAN WOOL MARKET IMPROVES

The 1947-48 wool season in Uruguay has started of more auspiciously than the preceding one. Advance sales of better type wools were made, principally to speculators, as early as mid-September before the new cip was even shorn. The market continued firm in November according to cabled advices with prices for super fine crossbreds around 40 cents a pound compared with 35 cents a year earlier.

Sales to the United States have been the dominating feature of the market so far. From October 1 to Mid-December, sales to this country totaled 13.2 million pounds, 90 percent of which consisted of new clip wool. Last season in the same period, sales were only about one-third of this quantity.

Exports to the United States through Mid-December totaled 15 million pounds apparently including some advance sales. Last year 12 million pounds moved by the end of December. Exports to all countries, however, will probably be greater than for the first three months of the season a year ago.

Apparent supplies for disposal during the 1947-48 season are estimated at 238 million pounds or about 10 percent larger than for the preceding season. Production showed a slight decrease of 4 percent to 168 million pounds but carry-over stocks as of October 1, 1947, chiefly of inferior sorts, are estimated at approximately 70 million pounds compared with 41 million pounds, a year earlier.

Exports for the entire 1946-47 season amounted to only 137 million pounds which was 4 percent below 1945-46 and 33 percent smaller than the large exports of 1944-45. Approximately 49 percent of the total in 1946-47 was shipped to the United States.

URUGUAY: Apparent Supplies and Distribution, 1934 - 1947.

Season beginning October	Carry-over beginning of season a/	Production a/	Available supplies	Consumption b/	Exports: Total c/	Exports: To United States
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Average -						
1934-38	11.0	117.9	128.9	8.2	109.9	14.7
1939	9.4	134.0	143.4	15.4	101.4	35.9
1940	26.6	138.8	165.4	15.1	140.8	119.7
1941	9.5	116.6	126.1	12.3	55.0	43.2
1942	58.8	123.6	182.4	19.9	102.9	97.6
1943	59.6	147.9	207.5	20.7	105.1	100.3
1944	81.7	152.1	233.8	11.8	204.0	174.0
1945	d/ 18.0	175.2	193.2	9.9	143.0	88.0
1946	41.3	175.7	217.0	10.0	137.2	67.1
1947 e/	69.8	168.0	237.8	-	-	-

Office of Foreign Agricultural Relations.
Compiled from information supplied by United States Embassy at Montivideo.
a/ Estimates of the Mercantile Exchange of Uruguay (Camara Mercantil de Productos del Pais). b/ Balance between production, exports and stocks. c/ Exports of Uruguayan wool (exclusive of small quantities of Brazilian or other wool in transit). d/ Apparent. e/ Preliminary.

GRAINS, GRAIN PRODUCTS AND FEEDS

(Continued from Page 429)

VALUE OF CANADA'S GRAIN CROPS SMALLER THAN IN 1946

The gross value of the 1947 grain crop in Canada is about $795,000,000 in Canadian currency, according to the first official estimate of the Dominion Bureau of Statistics.

This first estimate, based on prices received from the beginning of the crop year (August) to the end of November, is subject to revision on the basis of any change in prices for the remainder of the season. The total value of grain crops, though comparatively high, was somewhat below the value set on the 1946 harvest, since total production was considerably smaller than that of a year earlier.

The 1947 wheat crop is tentatively placed at $399,000,000, a reduction of about $74,000,000 from the revised estimate for the 1946 crop. The value of that crop was less than in 1946 in each of the Prairie Provinces, but was higher in eastern Provinces. Values of other grain crops were also lower than in 1946 in each of the Prairie Provinces.

While the total value of grains is placed at a higher figures than in 1946, the value of forage crops, especially hay and clover was considerably higher than a year ago, because of larger outturns and higher prices.

(Continued on Page 439)

ECONOMIC DEVELOPMENTS

FRENCH-SWEDISH TRADE AGREEMENT CONCLUDED

A new agreement for the exchange of commodities between Sweden and France, during the twelve-month period ending October 31, 1948, has recently been announced. It is reported that Swedish exports to France are to be valued at approximately 180 million Swedish crowns (about U. S. $5 million) and are to consist about one-half of lumber and forest products, and about one-half machine-shop products.

French exports to Sweden are to be valued at approximately 230 million crowns (about U. S. $6.4 million) and will include 90 million crowns (approximately U. S. $2.5 million) worth of textile products, mainly yarns and threads, and including 750 tons of wool tops and 100 tons of wool waste. Textile machinery and knitting machine needles are among the metal manufactures listed for French export. Of interest among the remaining items are fruit, spices, hardwood lumber, phosphates and other colonial products, and wines and spirits.

The Swedish import surplus is intended to furnish France with funds for payment to Sweden of freight and compensation for other Swedish services as well as repayment of credits previously extended to France.

MEXICO'S NEW EXPORT TARIFF EFFECTIVE JAN. 1, 1948

A recently published decree practically rewrites Mexico's export tariff schedule, exempting many of the old tariff items from payment of any duty, and placing most of the fractions of the new schedule on an ad valorem basis. A large proportion of the fractions will be subject to an ad valorem rate of 5 percent, while 10 percent appears to be the maximum rate except for a few cases which are dutiable on both specific and ad valorem bases.

Subject to the advice of the Tariff Committee, the Ministry of Finance and Public Credit will fix official prices on export commodities. The ad valorem duty will be based either on this valuation or on the value stated in the commercial invoice, whichever is larger. The 12 percent export tax on the official valuation (aforo) of many commodities exported from Mexico, which has been in effect since 1938, is abolished by the new law, which also repeals all other conflicting legislation.

The new decree goes into effect January 1, 1948, but the President of Mexico is authorized until December 31, 1948, to revise the new export duty schedules in whole or in part.

NO CHANGE IN CANADIAN FIELD CROP ACREAGE GOAL FOR 1948

It was decided at the Agricultural Conference in Ottawa, held December 1-3, 1947, that the acreage goals of Canadian field crops in 1948 should not be changed from those of 1947. Whether there will, nevertheless, be some increase in wheat acreage in 1948 above the 23,900,000 acres harvested in 1947 will depend largely on the market prospects, particularly the comparative price of wheat and livestock products.

Adjustments in Canadian prices affecting both wheat and livestock producers are under consideration. The Minister of Agriculture announced at the Goals Conference that some action would be taken which would result in prices rising on products fed from grain which would take care in the future of the increase brought about in feed costs through the removal of subsidies. The price which the British Ministry of Food will pay for Canadian wheat will be increased as of January 1, 1948 from $1.55 to $2.00 per bushel. The Canadian Government announced at the opening of Parliament on December 5, that legislation would be sought at the present session to increase the initial wheat price (currently $1.35), which is guaranteed farmers by the Canadian Wheat Board.

GRAINS, GRAIN PRODUCTS AND FEEDS

(Continued from page 437)

CANADA: Gross value of specified grain and forage crops 1947, with comparisons a/

Crop	1945	1946	1947
	1,000 dollars	1,000 dollars	1,000 dollars
Wheat	367,467	472,644	398,694
Oats	203,113	206,242	187,406
Barley	105,452	104,392	121,004
Rye	8,680	19,651	42,610
Buckwheat	4,544	4,789	6,231
Mixed Grains	30,353	35,358	33,115
Corn, shelled	10,774	11,269	14,460
Hay and clover	213,769	183,974	228,987
Alfalfa	48,130	37,422	38,345
Fodder corn	15,188	16,711	19,814
Grain hay	5,915	10,092	9,264
Total	1,013,385	1,102,544	1,099,930

From reports of the Dominion Bureau of Statistics.

a/ Value reported in Canadian currency.

WORLD CORN PRODUCTION (Continued from Page 428)

of smaller yields. Above-average yields were reported for the Philippine Islands, bringing production above average despite a substantial reduction in acreage.

Production in Africa is expected to be slightly smaller than the near-average crop in 1946. Some reduction in planting is expected in the Union of South Africa, where last year about 35 percent of Africa's total was produced. Planting is still in progress in that country, and harvesting normally begins in April.

South America's corn crop is so much later than that of the Northern Hemisphere that no official estimates of acreage planted are yet available. In Argentina and the important corn growing southern area of Brazil, planting is just being completed. In northern Brazil planting extends from December into February. A slight increase in acreage is forecast for the continent. If yields are around average the total outturn would be moderately smaller than the below-average crop of 1946. The decline in last year's production was due to reduced acreage, especially in Argentina where harvested acreage had declined from 10,775,000 acres in the prewar period to 6,431,000 acres.

Corn is of minor importance in Oceania with average production during 1935-39 only 7 million bushels. The acreage now being planted is expected to be slightly smaller than last year's acreage.

This is one of a series of regularly scheduled reports on world agricultural production prepared by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the Committee was composed of C.M. Purves, Acting Chairman, Judith E. Downey, L. Bacon, and W. Kling.

N O T E

Beginning with the January issue, the Office of Foreign Agricultural Relations publication, Foreign Agriculture, will be somewhat extended in size, and will also include material of the type formerly published in Agriculture in the Americas, which will no longer appear as a separate publication. Some features of both magazines have been retained in the new Foreign Agriculture, but in style and format the new publication has been patterned more nearly after Agriculture in the Americas. Subscribers to Agriculture in the Americas and to Foreign Agriculture will receive the combined publication until further notice.